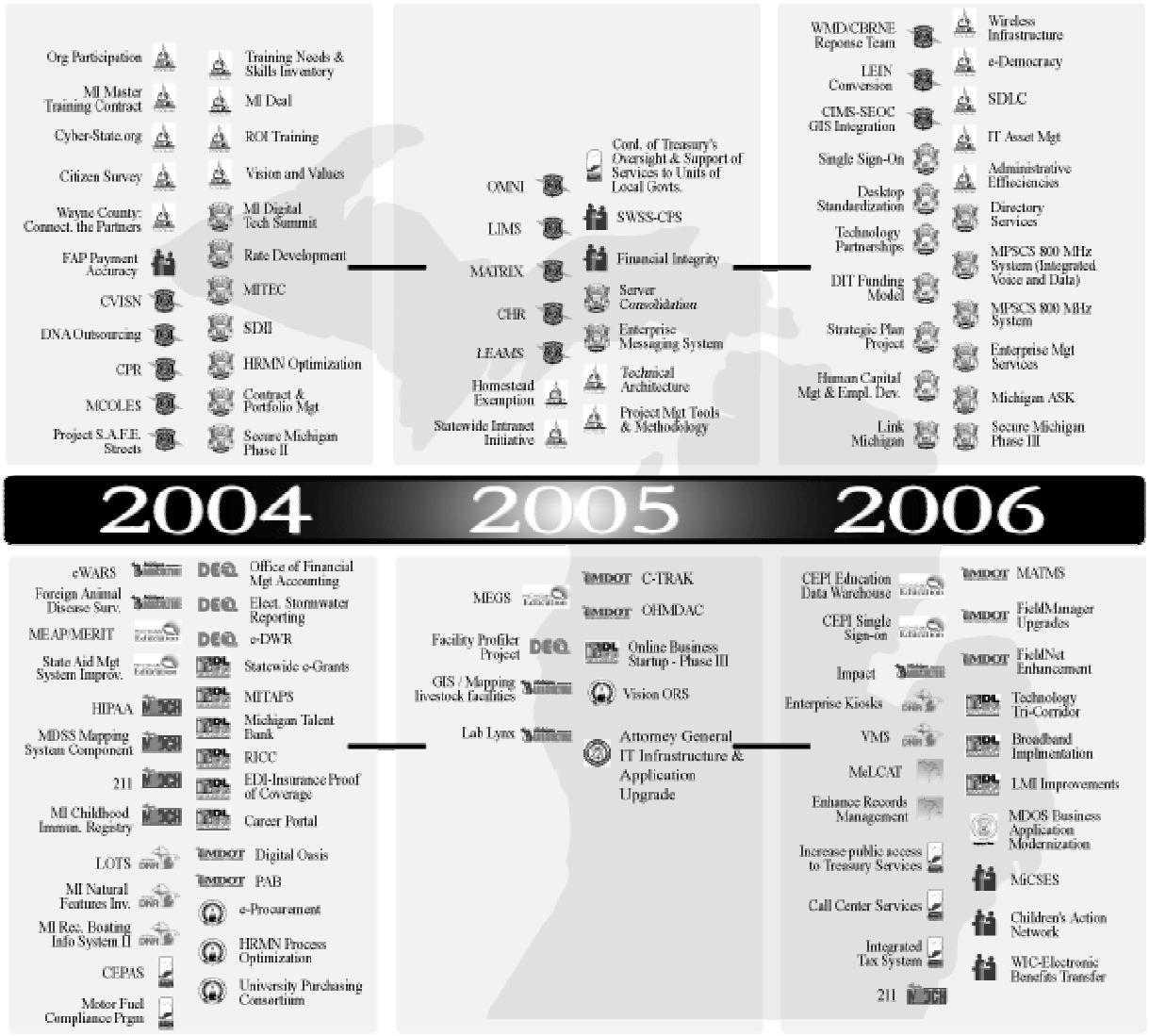
Appendix D
IT Eighteen Month Tactical Plan

As part of the systematic approach to planning and analysis, the Office of Strategic Policy has separated the department's Tactical Plan into two distinct planning guides: 2004 – 2007 Strategic Plan and the 18-month Tactical Plan. The 18-month Tactical Plan covers the timeframe from April 2004 through September 2005 and will be revised on a 6-month rolling schedule.

To ensure that projects are identified and approved prior to initiation and executed effectively, DIT uses the Project Board for all initiatives within the Tactical Plan.

The road to a connected Michigan starts with a single step. Below is a timeline of all strategic initiatives being executed by DIT.



MICHIGAN DEPARTMENT OF INFORMATION TECHNOLOGY

DRAFT

18-Month Tactical Plan

The 18-month Tactical Plan is a compilation of all of the IT projects requested by the agencies and infrastructure or agency services projects that affect the agencies. These projects have been approved and are funded by the agencies. The projects may be agency specific, affect multiple agencies, or an enterprise-wide solution.

The Program Management Division (PMD) serves as the entity that provides monitoring and reporting capabilities for the 18-month Tactical Plan. Through the agency portfolio liaisons, project information is updated on a monthly basis. This information includes but is not limited to:

- Project Name
- Project Description
- Start/End Date
- Risk (red, yellow, green)
- Overall Status (red, yellow, green)
- Project Manager / Portfolio Liaison
- Primary Agency
- Major Milestones
- Total Projected Costs

Project finish dates are reported to the Governor's Office through the Director on a regular basis.

A Project Dashboard report is also created on a monthly basis. This report is a compilation of key information on DIT Top IT initiatives. A series of steps are performed on a monthly basis to generate this report. The project manager completes the status report based on the previous month's activity and forwards it to the portfolio liaison, business sponsor, and DIT leadership owner. The portfolio liaison forwards the information to PMD. The Dashboard report is forwarded to the DIT leadership team, portfolio liaisons, and project managers. The Executive team views the report. The Dashboard report is communicated throughout DIT via TechTalk and the DIT project management website. Follows is an example of the Dashboard Report.

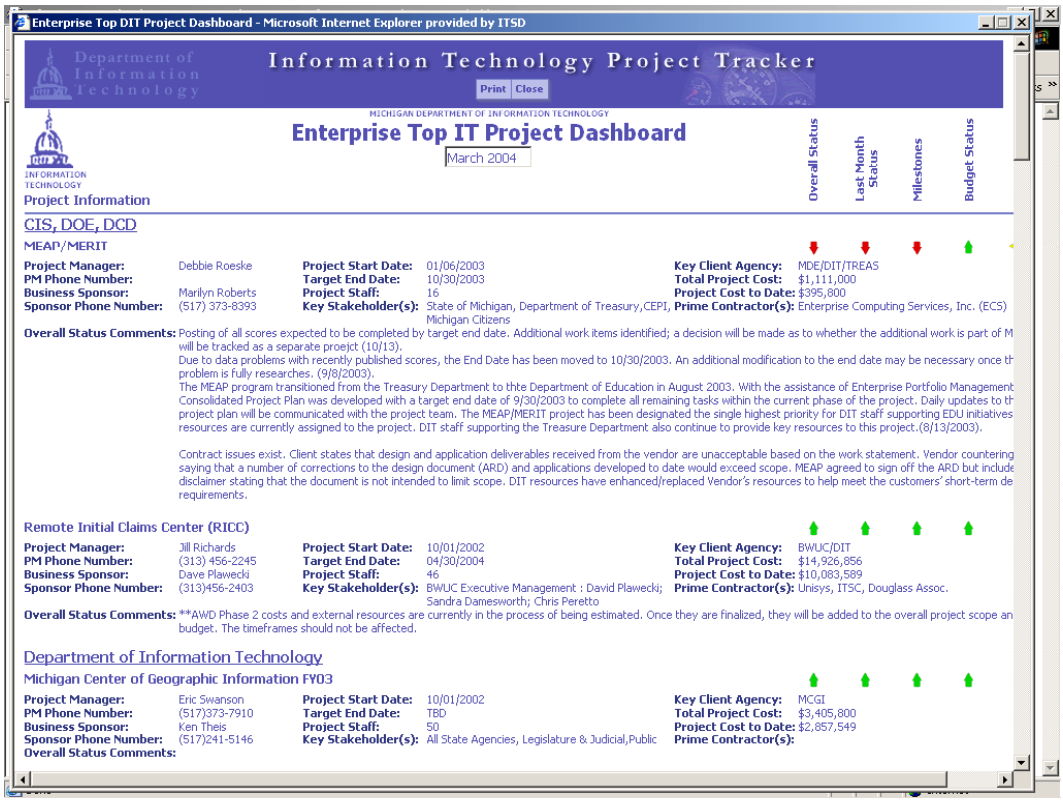


Figure 1. Project Dashboard Example

Project Board

The Project Board is key to the effective implementation of the Information Technology Tactical Plan. The Project Board maintains the structure that assures Level 2 and Level 3 projects being planned and executed within DIT are approved and that these projects are being initiated, planned, and executed in accordance with DIT project management best practices. Level 2 projects are defined as meeting one or more of the following criteria:

- Multi-agency projects
- Cross-functional DIT components
- Greater than $1 million IT budget
- Non-standard technology
- DIT is on the Executive Steering Committee

Level 3 projects are defined as meeting one or more of the following criteria:

- Greater than $5 million
- Executive Interest/Order
- Media Involvement

The Project Board has the following objectives:

- Ensure that Level 2 and Level 3 projects are aligned with the enterprise strategic and architecture plans.
- Ensure Level 2 and Level 3 projects comply with DIT principles and policies.
- Verify that Level 2 and Level 3 projects have a qualified project manager, a realistic and sound project schedule, incorporated project management methodology, and agency and DIT buy-in.
- Review and approve major scope, schedule, and budget changes to Level 2 and Level 3 projects.

Three processes have been developed for State of Michigan Information Technology Projects that are overseen by the Project Board and/or the Program Management Division: Pre-Initiation, Initiation, and Approval.

Pre-Initiation - The Pre-Initiation Process is used when a DIT project has been submitted for pre-initiation. The DIT Project Manager submits the Project Concept Document to the Project Administrator for review by the Project Board. The DIT Project Manager with his/her team will present the project to the Project Board during this Gate 1 Review. This Gate 1 Project Review assures proper direction and support, strategic alignment, collaboration and leveragability, security, funding, benefits, technology and standards, and project management. Following the Gate 1 review, the Project Board will complete a weekly dashboard report showing a summary of the reviewed projects and their decisions (i.e. red for "not approved", yellow for "additional information required", and green for "approved"). An escalation process to the Leadership Team/Board is available if necessary.

Initiation - The Initiation Process is used when a DIT project has been approved through Gate 1 and is ready for project initiation. Following requirements gathering and alternative analysis, the DIT Project Manager submits the Project Charter and Schedule to the Project Administrator for review by the Project Board. The DIT Project Manager with his/her team will present the project to this Project Board during this Gate 2 Review. This Gate 2 Project Review assures adequate resources, applicable metrics and measures, appropriate contracts, security, funding, technology and standards,

identified risks and issues, required accountability and project management. The Gate 2 review may also lead to more in-depth processes associated with agency services, strategic planning, architecture and standards, infrastructure, and security. Following the Gate 2 review, the Project Board will complete a weekly dashboard report showing a summary of the reviewed projects and their decisions (i.e. red for "not approved", yellow for "additional information required", and green for "approved"). An escalation process to the Leadership Team/Board is available if necessary.

Approval - The Approval Process is used when a DIT project has been approved through Gate 2 and is ready for project approval. Instead of completing a Memorandum of Understanding for each project, the Project Charter will be used as the signatory document. Once the Project Charter has been signed by both DIT and the agency, the project moves into the project-planning phase and project tracking to the Program Management Division.

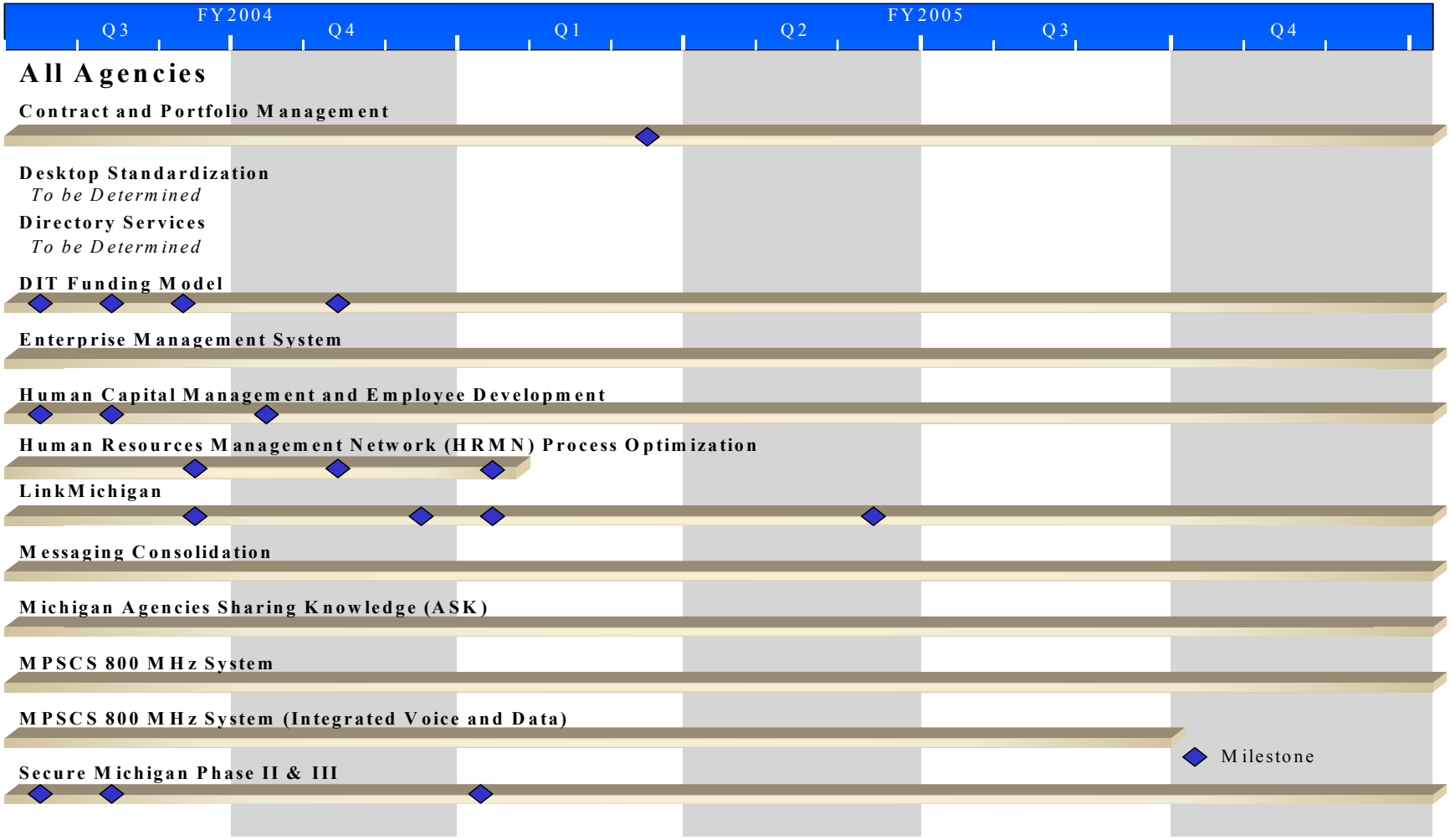
The Project Board processes were developed through a cross-functional team leveraging best practices within DIT and information from IT research companies, such as the META Group. The Gate 1 and Gate 2 reviews were created using documentation and best practices from the Project Management Institute, the United States Office of Management and Budget, and the Michigan Information Technology Executive Council. These documents include, but are not limited to the OMB Program Assessment Rating Tool, DIT Guiding Principles, and Teradyne's Phase-Gated Project Execution Process.

The Project Board is comprised of members from the Program Management Division, Infrastructure Services, Strategic Planning, Enterprise Architecture and Technology Standards, and Enterprise Security. Ad hoc members are dependent on the projects being brought forward to the Project Board and may include project managers, client specialists, and infrastructure specialists.

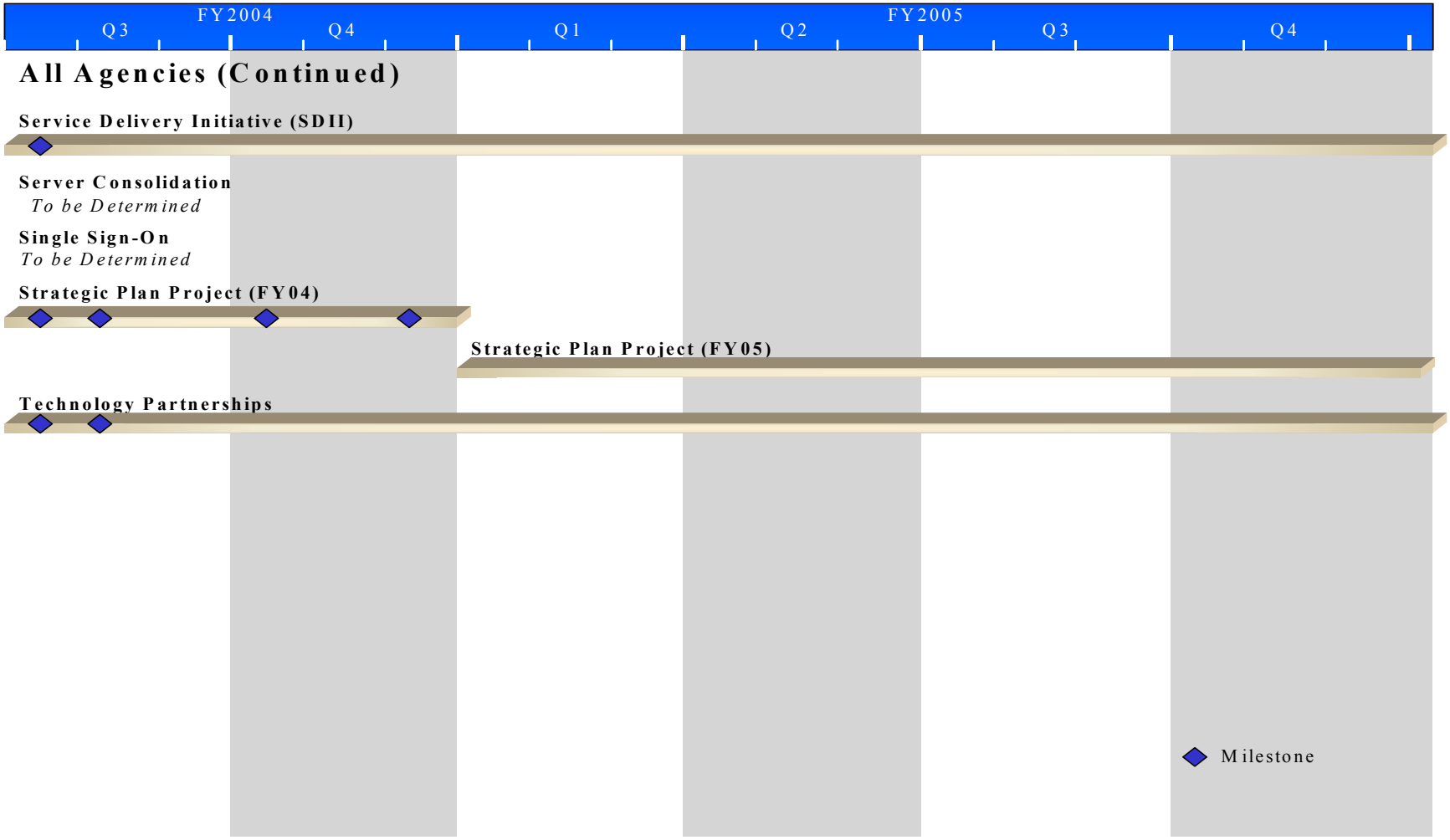
The Project Board meets on a weekly basis to review and approve projects. These approved projects are incorporated into the Information Technology Tactical Plan.

Tactical Plan Timeline

Follows is a timeline that reflects IT initiatives that will be rolled out within the 18 months. Also included is the occurrence of Major Milestones.



Tactical Plan Timeline (continued)



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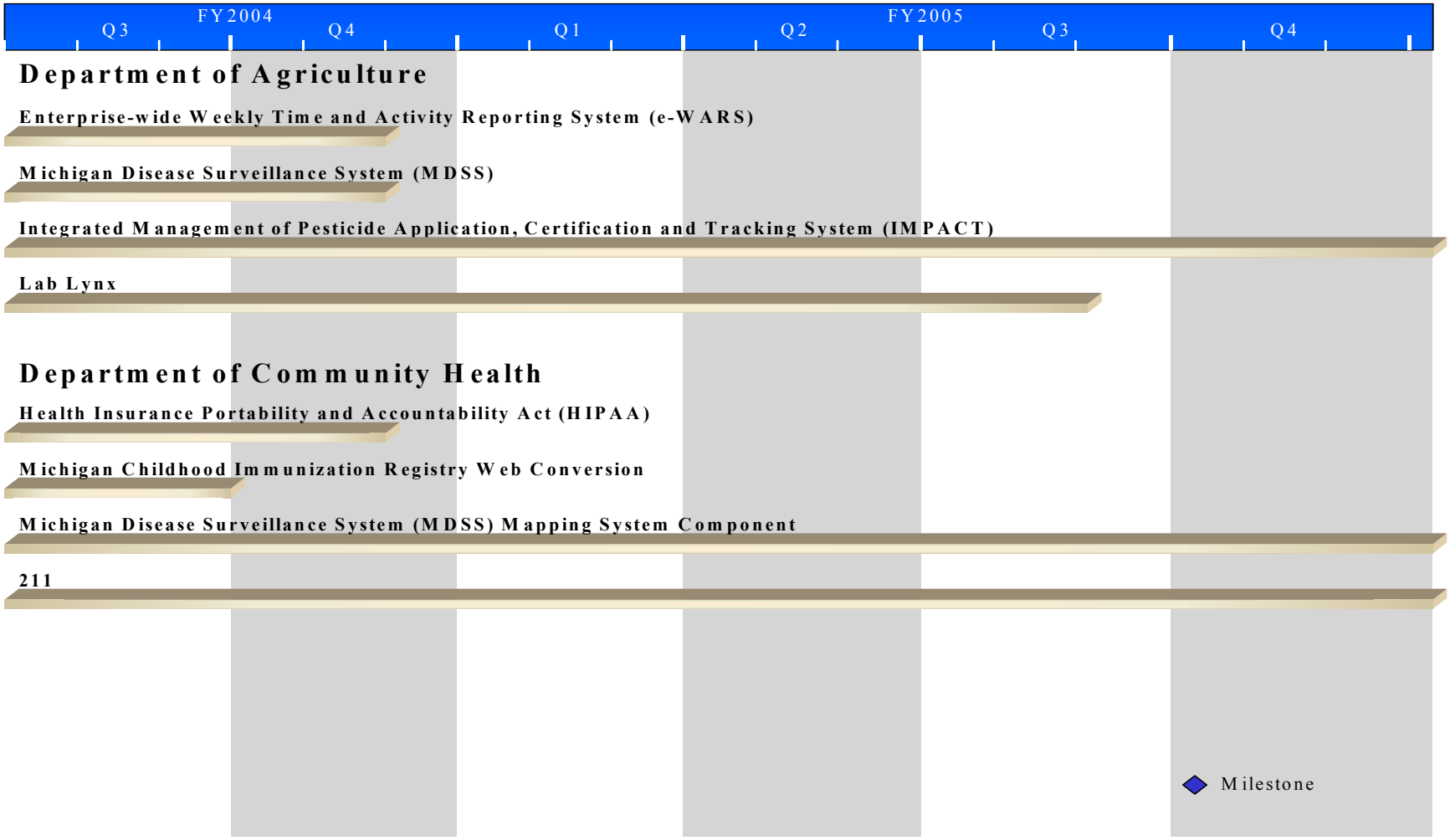

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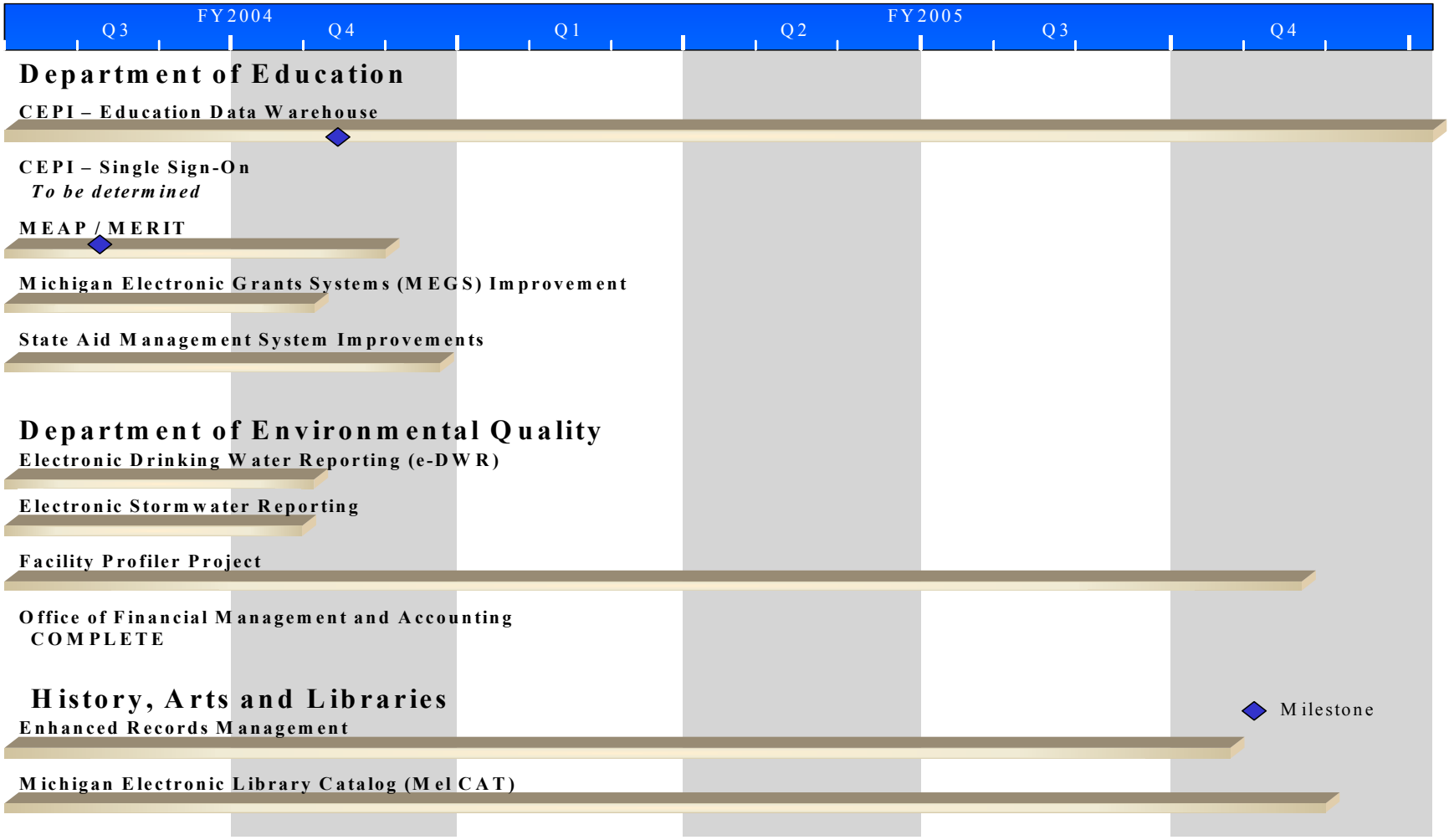

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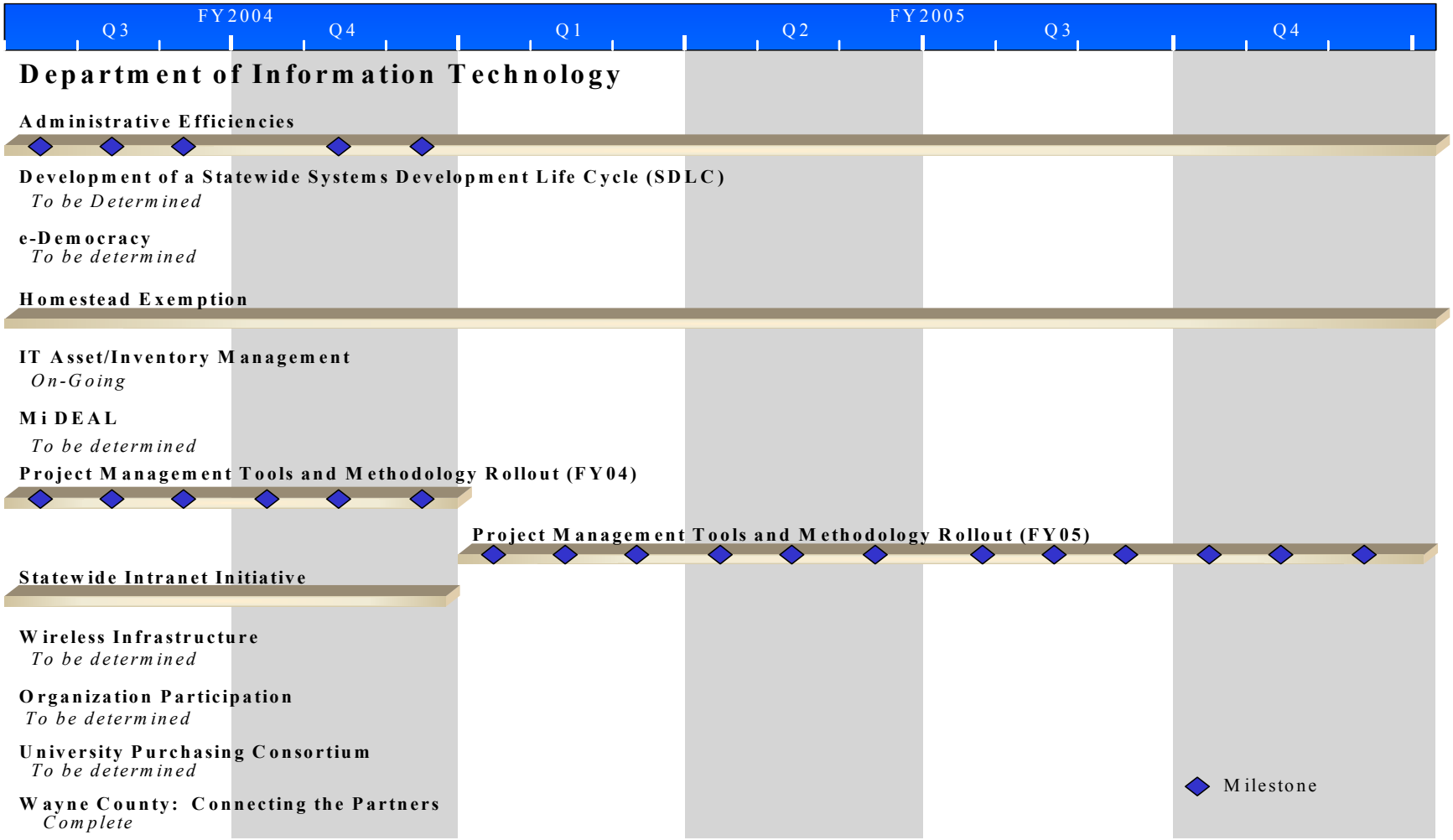

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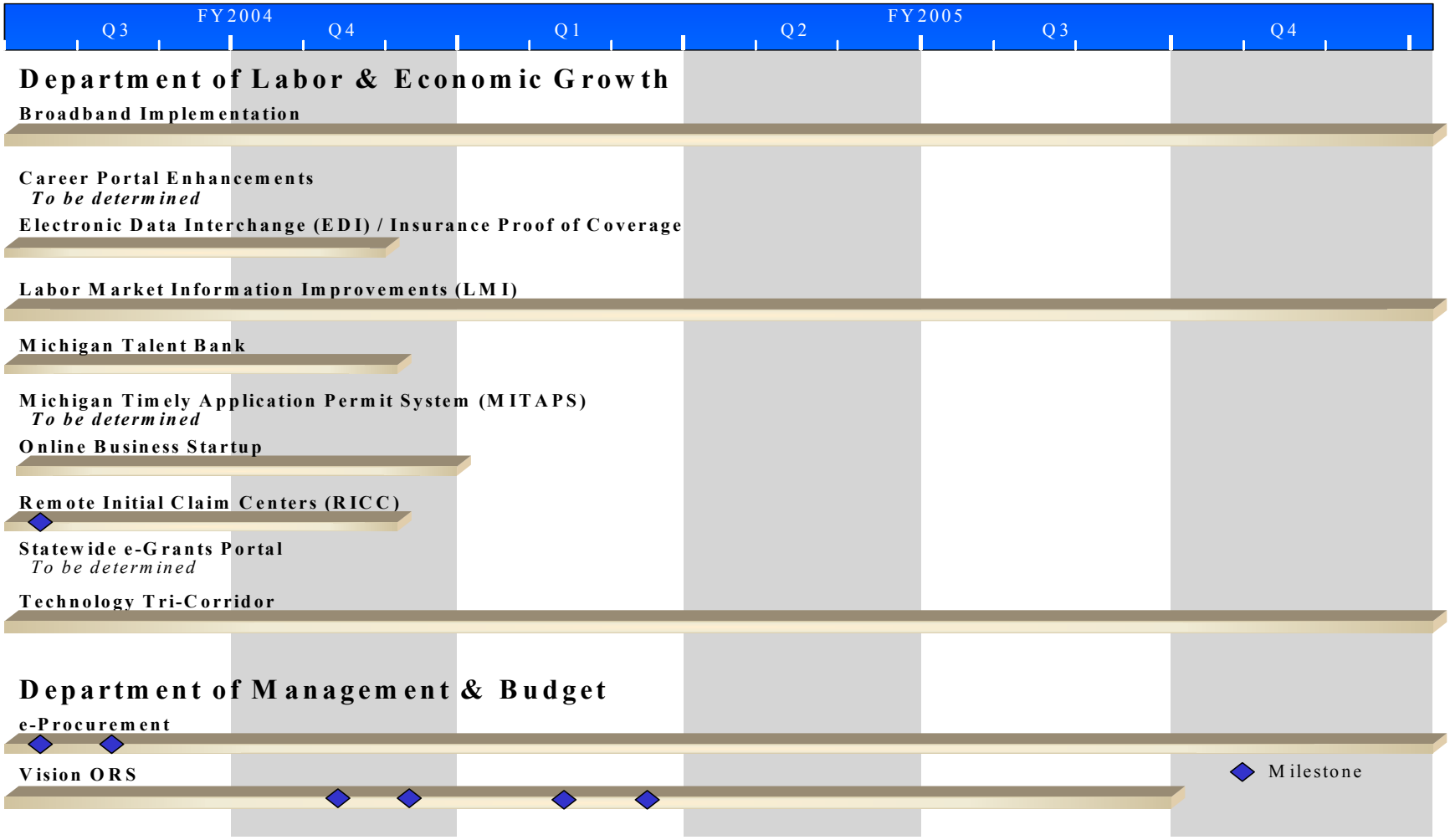

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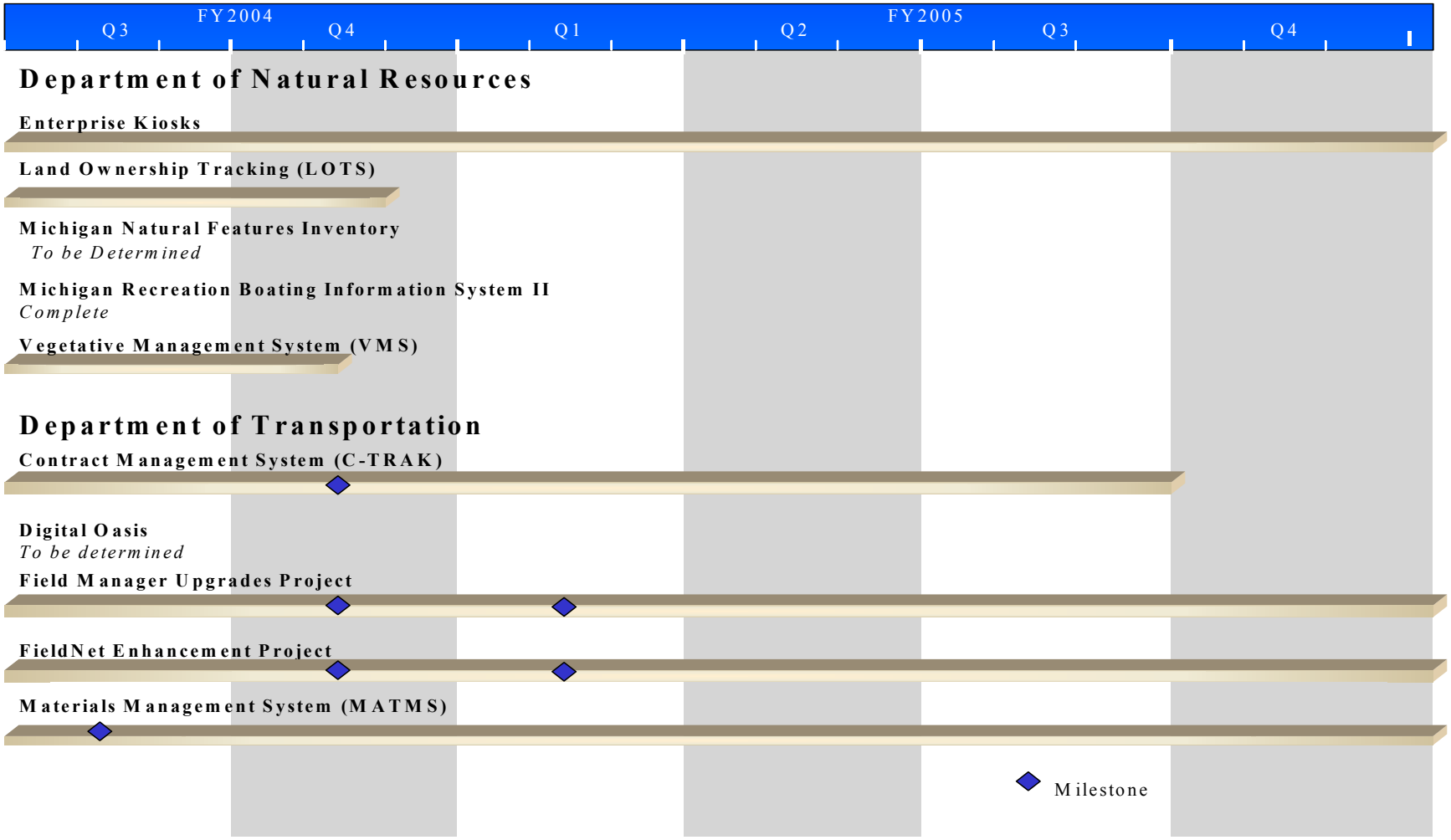

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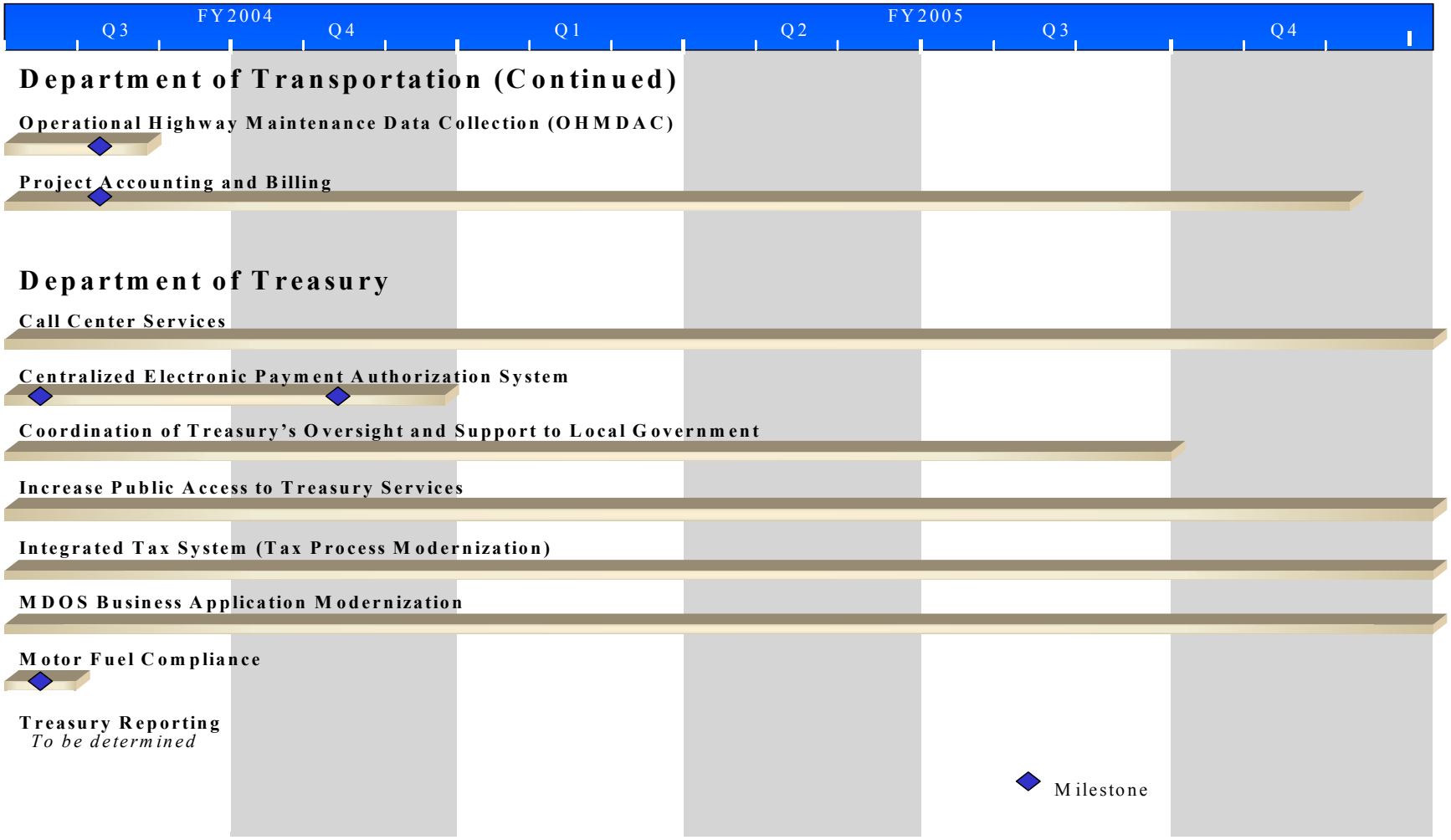

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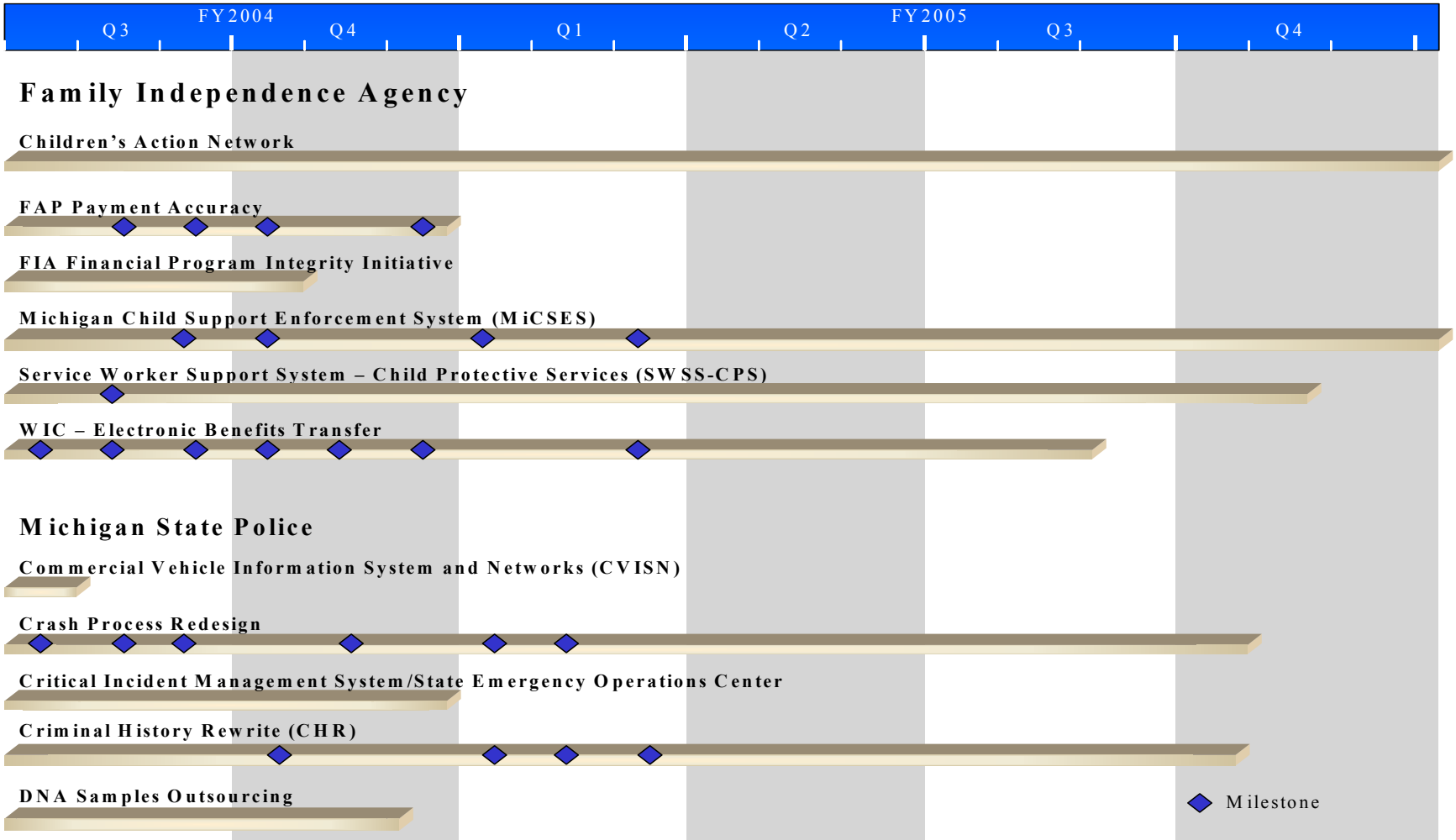
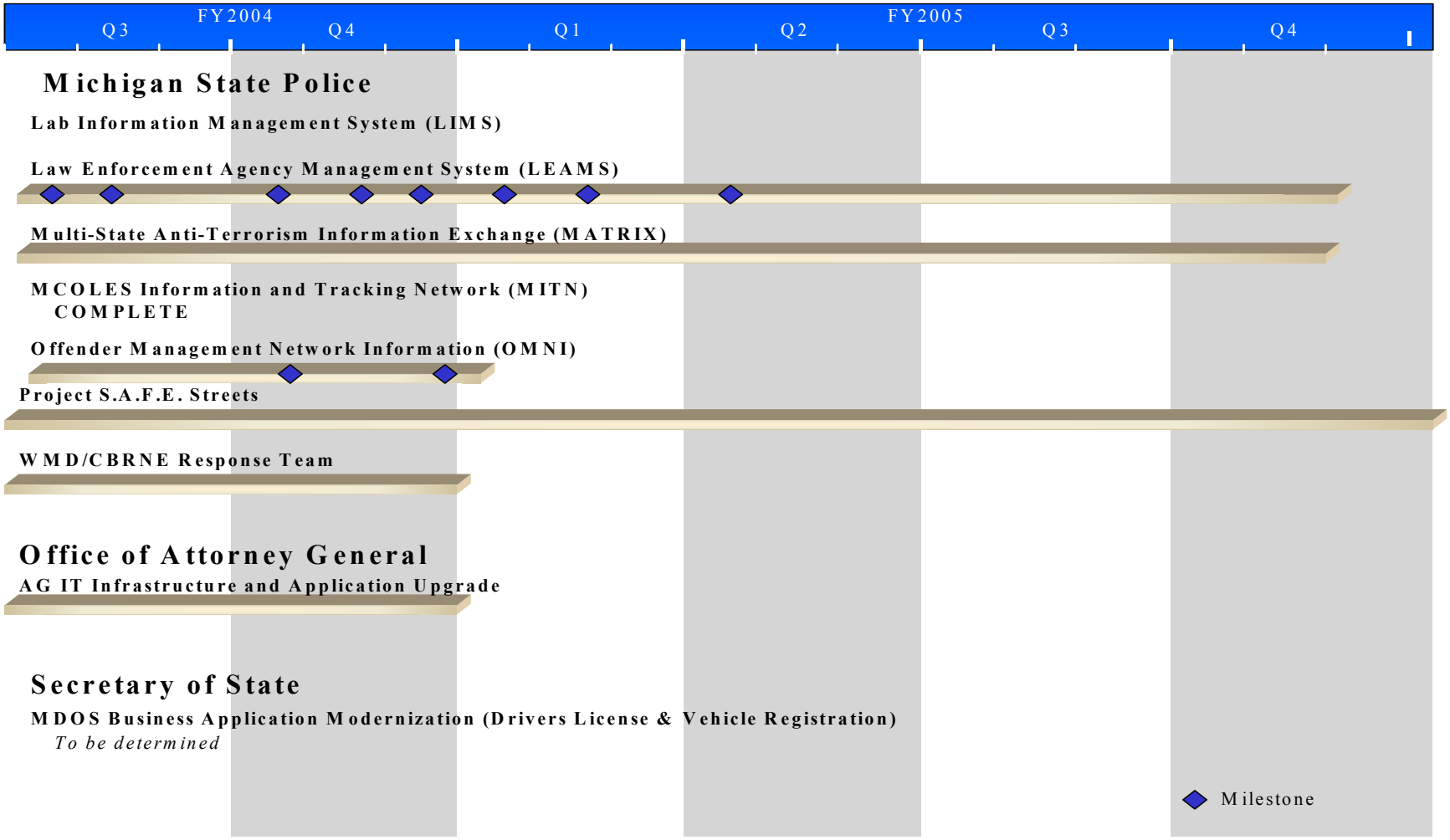
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